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ABSTRACT

In 1977-78, California Assemblyman Dennis Mangers headed an Assembly Education Committee Task Force on elementary and secondary principals. The task force was established to review the adequacy of preservice training, evaluation, and continuing professional development of principals. Members addressed questions about the role of the principal, skills needed in the role, changes needed in preservice and inservice training, and ways to improve administrator effectiveness. The task force concluded that because of increased social pressures and a burgeoning number of mandated programs, the principal's role today is much more demanding. The investigation resulted in extensive findings and recommendations concerning preservice training and credentialing, principal recruitment and selection, administrator professional development, administrator support systems, and principal evaluation. The report concludes with the recommendation that a major effort must be made by state and local governments to define the role of principals, give principals adequate support and assistance, and hold principals accountable for defined tasks. A lengthy appendix presents the skills necessary for school leadership, the general criteria for the evaluation of principals, a scope and content statement for the administrative services credential, an analysis of educational programs administered by principals, and a list of task force members. (Author/JM)

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THE SCHOOL PRINCIPAL:
RECOMMENDATIONS FOR EFFECTIVE LEADERSHIP

Assembly Education Committee
Task Force for the Improvement
of Pre- and In-Service
Training for Public School Administrators

Assemblyman Dennis Mangers
Task Force Chairman

September 1978

State Capitol
Sacramento, California

EA 011 215

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I. INTRODUCTION: THE PRINCIPAL AND SCHOOLING

The principal plays a pivotal role in the life of a school.

> In many ways the school principal is the most important and influential individual in any school. He or she is the person responsible for all activities that occur in and around the school building. It is the principal's leadership that sets the tone of the school, the climate for learning, the level of professionalism and morale of teachers and the degree of concern for what students may or may not become. The principal is the main link between the community and the school and the way he or she performs in the capacity largely determines the attitudes of parents and students about the school. If a school is a vibrant, innovative, child-centered place, if it has a reputation for excellence in teaching, if students are performing to the best of their ability, one can almost point to the principal's leadership as the key to success. 1/

A growing body of research indicates that at schools where student achievement is higher than might be expected principals provide strong leadership and support. 2/ Faculties at these schools report that their principals facilitate innovation, support teachers in efforts to promote new ideas, and go out of their way to assist in acquiring needed materials.

Other studies show that the principal is the most effective agent for bringing about educational improvement:

> We call the principal the gatekeeper of change. The reason is that if you had to pick one figure in the school system who really matters in terms of whether you get change or not, it is the principal. In terms of student outcomes, the principal is really key.
>
> I am talking about principals who give active support to improvement projects. We found out that if a principal is against a project, no matter what other circumstances exist in the district, the project isn't going to make it. It is going to fall apart, or it is not going to be continued. More surprising was that if a principal is neutral, there is also a problem. 3/

The principalship can be challenging, exciting and rewarding. The job provides unique opportunities to effect educational change. An effective principal can organize a school for instructional improvement and within one year see positive changes in pupil behavior.

Although principal leadership is essential to effective schooling, research shows that many principals are neither prepared nor encouraged to be educational leaders. According to principals, administrator training does not always match responsibilities of the job, the role and tasks of principals are seldom clearly defined, systems for evaluating principal performance are often ineffective, and opportunities for continuing development are inadequate.

California state policymakers are increasingly aware of the need for strong leadership at the local school level. They also know that more than 70% of school administrators in the state are over the age of 55. California will thus have an influx of new principals in the coming decade. Steps must be taken soon if these principals are to develop the skills and receive the assistance necessary to their complex, demanding role.

In September 1977 Assemblyman Dennis Mangers (D-Huntington Beach) received legislative approval to establish an Assembly Education Committee Task Force on the subject of elementary and secondary school principals.[4/] Officially called the Task Force for the Improvement of Pre- and In-Service Training for Public School Administrators, the group is comprised of 60 principals, superintendents, teachers, lay persons, legislative and state agency staff and postsecondary educators.[5/]

The Legislature charged the task force to focus on school principals, specifically to "review the adequacy of pre-service training, evaluation,

and continuing professional development of school principals and report its findings, including proposed changes in the current system, to the Legislature by September 30, 1978."

In response to this legislative mandate, the task force addresses the following questions in this report:

* Has the role of the school principal changed in recent years? If so, what are the primary factors leading to such changes?

* What skills and abilities are necessary for effective school leadership today?

* Are major changes needed in administrator pre-service and in-service training to ensure that all school principals in California gain the skills and abilities necessary to be effective?

* What should be done by the Legislature, professional associations, school districts, county offices of education, institutions of higher education, state agencies and local educators to improve administrator effectiveness?

While the task force was addressing these questions, California voters approved Proposition 13 to limit local property taxes. The vote and a subsequent state poll produced a clear message: the majority of the California electorate believe that government at all levels is inefficient.[6/] Voters who approved Proposition 13 feel that government, including public school districts, does not make wise use of tax monies. The majority of "No on 13" voters agree.[7/]

As a result, government at all levels should review policies and program expenditures, eliminate unnecessary programs and ensure that necessary programs are operated effectively at the lowest possible cost.

Some of the task force's recommendations can be implemented by the infusion of new resources; however, the majority of the recommendations result not from inadequate funding, but from lack of direction. Thus, this report can assist state and local policymakers to set new priorities

which can be accomplished using existing funds. Thoughtful implementation of these recommendations can increase the effectiveness of administrators and thereby improve education for California public school pupils.

SUMMARY OF FINDINGS

I. THE PRINCIPAL AND SCHOOLING

1. Research indicates that at schools where student achievement is higher than might be expected, principals provide strong leadership and support (p. 1).

2. Studies show that the principal is the most effective agent for bringing about educational improvement (p. 1).

3. Although principal leadership is essential to effective schooling, many principals are neither prepared nor encouraged to be educational leaders (p. 2).

II. THE PRINCIPAL'S CHANGING ROLE

4. Many forces for social change are being applied to the school (p. 18).

5. Programs recently mandated by the courts, federal and state governments and school boards have dramatically changed the demands being made on school principals (p. 18).

6. Effective leadership may be impossible for many principals unless they receive additional support and assistance (p. 19).

7. Major changes need to occur in five areas in order to ensure that school principals gain the skills, abilities and awareness necessary for effective leadership. These areas include: pre-service training; recruitment and selection; continuing professional development;

support services and evaluation (p. 19).

III. PRE-SERVICE TRAINING AND CREDENTIALING

8. According to many principals, their academic training did not prepare them for their major responsibilities as school administrators (p. 21).

9. The current licensing system lacks high standards for evaluating the adequacy of a candidate's preparation (p. 22).

10. Candidates for an administrative credential may not be required to go through a field experience which provides them with an opportunity to experience the demands placed on the principal (p. 23).

11. Little effort is made to identify exemplary principals and assign field work candidates only to the masters in the profession (p. 23).

12. The current examination process is inadequate for measuring the competence of candidates for an administrative credential (p. 24).

IV. RECRUITMENT AND SELECTION

13. Many districts allocate resources for recruitment and selection which are insufficient to adequately evaluate a candidate's strengths and weaknesses (p. 26).

14. The selection process seldom requires the candidate to demonstrate competence in the field (p. 26).

15. The selection process does not ensure that the search is broad

and that the applicant pool reflects qualified persons, including minorities and women (p. 27).

V. CONTINUING PROFESSIONAL DEVELOPMENT

16. Research indicates that continuing professional development is critical to effective school programs (p. 32).

17. Continuing development for prinicpals is funded in selected districts by the state through categorical programs (p. 32).

18. Despite state, local and private efforts, support for comprehensive continuing development for principals is inadequate (p. 33).

19. Few districts operate under policies and programs which systematically provide principals with needed skills (p. 33).

20. Typically, professional development programs place participants in a receptive role with little opportunity for them to identify their training needs (p. 33).

VI. SUPPORT SERVICES

21. Some principals are finding that they face an increasingly complex role with limited opportunities to gain requisite leadership skills and to receive technical assistance (p. 38).

22. Principals can find themselves isolated and overwhelmed. As a result, some principals try to do everything while others react by doing as little as possible (p. 38).

23. The key to an effective system of principal support is district organization (p. 38).

24. The skills needed to provide technical assistance and training for principals are available among principals, district staff, county offices, the State Department of Education, professional organizations and college and university faculty. The job is one of coordinating resources to link principals and others who possess the needed skills with those who need training and assistance (p. 39).

25. Recent research suggests that successful school improvement projects give school level staff the skills to identify and solve problems themselves (p. 39).

26. Districts can benefit by recognizing principals as a key resource in problem identification and resolution (p. 40).

VII. EVALUATION

27. The effectiveness of school principals in some districts is too often measured by their ability to "keep the lid on" and serve the needs of the school district bureaucracy (p. 42).

28. Some principals report: (a) little knowledge of criteria used by supervisors to evaluate them, (b) infrequent evaluations, (c) judgments by supervisors which are seldom based on direct observation, (4) little involvement of those to whom their work was most visible--teachers, students, parents and other administrators, (5) primary attention is given to minor objectives, such as "accuracy and punctuality in submitting reports" and maintaining an attractive school (p. 42).

VIII. RECOMMENDATIONS FOR FURTHER STUDY

29. In general, principals are criticized for their inability to evaluate teacher competence and remove ineffective teachers (p. 46).

30. A preliminary examination reveals that:

(a) Many school and district level administrators do not fully understand the rules and procedures governing employee evaluation (p. 46).

(b) Too many administrator training programs do not adequately prepare credential candidates for evaluating personnel (p. 46).

(c) Many principals do not receive assistance in personnel evaluation from the district office (p. 46)

(d) Some school districts have accepted contract provisions which weaken the personnel evaluation process (p. 47).

(e) Lack of authority over selection and assignment of staff can erode the principal's ability to hold staff accountable for their performance (p. 47).

(f) In general, many of the principals hesitate to exercise their authority (p. 47).

(g) Some union officials, who are interested in gaining and retaining members, provide attorneys to each of their members facing dismissal, including teachers in whom the union has little confidence (p. 47).

(h) Close political relationships between some union officials and school board members can thwart conscientious principals (p. 48).

SUMMARY OF RECOMMENDATIONS

Pre-Service Training and Credentialing

1. We recommend that the Legislature revise current law to require the Commission for Teacher Preparation and Licensing, in conjunction with representatives of postsecondary educators and school administrators, to: (a) identify the competencies necessary for being an effective school leader (using Appendix A of this report as needed); (b) devise techniques and procedures for approved institutions to measure these competencies; and (c) regularly update these competencies and other credential guidelines to reflect changing requirements (p. 24).

2. We recommend that postsecondary institutions which offer administrator credential programs ensure that:

   (a) Required courses include specific learning activities centered around identified competencies;

   (b) Professors of school administration receive ongoing professional development regarding the changing role and responsibilities of the school principal;

   (c) Exemplary school administrators are encouraged to work as part-time professors of school administration;

   (d) All credential candidates have opportunities to complete field experiences, under the direction of exemplary principals, which are designed to allow the candidate to acquire identified competencies;

(e) Credential candidates have mastered identified competencies in the field before they are recommended for credentials (pp. 24-25).

3. We recommend that the Commission for Teacher Preparation and Licensing ensure that its assessment process determines whether administrator credential candidates have adequate opportunities to master identified competencies (p. 25).

4. We recommend that the Legislature eliminate the option of obtaining the administrative services credential through the existing examination process and require all credential candidates to demonstrate competence in the field (p. 25).

5. We recommend that the Commission for Teacher Preparation and Licensing, in cooperation with appropriate postsecondary institutions, report to the Legislature within three years regarding implementation of these recommendations (p. 25).

Recruitment and Selection of School Principals

1. We recommend that school district governing boards establish written policies for the recruitment and selection of school principals which reflect community needs and provide for a thorough, open and extensive search (p. 30).

2. We recommend that the Legislature, in conjunction with school districts, county offices of education and colleges and universities establish pilot projects to assist selected school districts in recruiting and selecting administrative personnel. These projects could:

(a) gather and organize information regarding techniques for selecting and evaluating management personnel; (b) serve as a clearinghouse for candidates and districts; (c) assist districts to evaluate candidates according to competencies prescribed by such districts; (d) conduct national searches for qualified candidates for job openings; (e) conduct research regarding improved techniques for evaluating administrative talent; (f) train central office administrators in needs assessment, and recruitment and selection procedures which are necessary to obtain school principals with skills and talent to match the position. Pilot projects could be conducted through county offices and/or staff development resource centers created by AB 551-Hart (Chapter 966, Statutes of 1977) (p. 31).

3. We recommend that the Legislature request the Legislative Analyst to report to the Legislature within two years on the progress made by districts in implementing recommendation number one regarding written policies for recruitment and selection of principals (p. 31).

Administrator Professional Development

1. We recommend that all school districts and county superintendents of schools develop written policies and practices to support ongoing professional development for each school principal in order to meet the "Criteria for an Effective Program" described in Section V (p. 34). We encourage school board and administrator professional associations and the State Board of Education to lend their support and encouragement to this end (p. 36).

2. We recommend that all school principals enter into an ongoing individualized professional development program consistent with district objectives, school improvement goals and the needs of the pupils they serve (p. 36).

3. We recommend that the Association of California School Administrators create a task force in conjunction with the dean of each school of education administration and representatives of practicing school principals to design and implement professional development activities consistent with the criteria described in Section V (p. 37).

4. We recommend that the Legislature revise and expand enacted legislation (Assembly Bill 65, Chapter 894, Statutes of 1977, and AB 551, Chapter 966, Statutes of 1977) to encourage and fund professional development for school principals consistent with the criteria described in Section V (p. 37).

5. We recommend that the California School Boards Association and the professional associations of administrators, together with one or more local school districts, county offices of education, and colleges or universities, create a professional development program for principals to serve as a model to other districts and counties (p. 37).

6. We recommend that the Legislature modify funding formulas for public universities to allow field-based administrator professional development consistent with the criteria described in Section V (p. 37).

7. We recommend that the Legislative Analyst report to the Legislature within two years regarding the implementation of recommendations 1, 2, 3 and 5 above (p. 37).

Improvement of Administrator Support Systems

1. We recommend that school districts, county offices of education and colleges and universities organize to support principal leadership by:

(a) Establishing and regularly updating a districtwide plan which specifies tasks required of school principals;

(b) Coordinating personnel, material and fiscal resources to provide principals with timely assistance needed to accomplish specified tasks;

(c) Providing ongoing, personalized professional development programs for principals which meet the criteria under Section V of this report (p. 34).

(d) Conducting regular reviews of principal performance vis-a-vis specified tasks and providing assistance when needed (pp. 40-41).

2. We recommend that school districts and county offices of education, in conjunction with site administrators, establish principal consortia to enable principals to share ideas and resources, provide personal support and involve principals in decisions that affect their ability to manage a school (p. 41).

3. We recommend that districts consider providing for administrative aides, particularly in schools where the principal is without a vice principal or dean (p. 41).

4. We recommend that the Legislative Analyst report to the Legislature within three years regarding the implementation of recommendations 1, 2 and 3 (p. 41).

Improvement of Principal Evaluation

1. We recommend that all school districts establish policies regarding evaluation of school principals, which meet the criteria established in Section VII (p. 42). We recommend that the California School Boards Association lend their support and encouragement to this effort. We recommend that the Legislature request the Legislative Analyst to monitor the implementation of this recommendation over a three-year period, and, if necessary, develop legislation to ensure timely implementation following the three-year review (p. 44).

2. We recommend that the State Department of Education establish a base of information regarding procedures for evaluating school personnel, including school principals. We recommend that such information be developed with the assistance of county offices of education, school districts, administrators, school board member professional organizations, and colleges and universities (p. 45).

3. We recommend that county offices of education, school districts, colleges and universities and associations of administrators and school board members design and conduct staff development for central district administrators in the evaluation of school administrators based on the criteria established in Section V (p. 34 and p. 45).

4. We recommend that the State Legislature, the State Department of Education, colleges and universities support research regarding the

effectiveness of school principals which will lead to the refinement of the criteria established in Section VII (p. 45).

Further Study

We recommend that the Legislature review the current system of personnel evaluation and support with assistance from representatives of school districts, administrator and teacher associations, colleges and universities and the public (p. 48).

II. THE PRINCIPAL'S CHANGING ROLE

Many forces for social change are being applied to the school. Parents, teachers and students are asking for more participation in school governance. State and federal governments have responded by making increasing demands for shared decisionmaking. In California, Assembly Bill 65[8] has formalized a shift in responsibility to the school site and a partnership in school decisionmaking. The principal, who has managed programs and enforced policies developed at other levels, now in addition develops programs in conjunction with parents, teachers and students in response to local needs.

At the same time, the courts, federal and state governments and school boards have increasingly prescribed how local schools are to function. Recently mandated programs and practices include: collective bargaining, pupil and staff integration, affirmative action, specified procedures in the placement of exceptional children, statewide testing, minimum proficiency standards in basic skills, and educational plans and needs assessments.

Many of these programs provide new opportunities to ensure quality education for all pupils. They have also dramatically changed the demands being made on school principals. The site administrator:

> . . . more than ever is caught between two colliding systems of control. He faces a superordinate structure (superintendent, school board, state legislature), which expects him or her to execute the formally established policies for the school. The principal also faces the teachers who are gaining and exercising the right in determining the rules and regulations which he is expected to administer. He also sees their gaining and exercising the right to monitor and expose his or her administrative performance while the principal's right to monitor their performance threatens to evaporate.[9]

The principal's role has become one of leadership in sorting out effective plans of action within an immensely complex set of requirements, alternative demands and opportunities. In some areas the principal has lost control. In others, the responsibilities of the principal have increased. In both cases, the skills necessary to lead in this challenging environment have multiplied.

A recent publication by the Association of California School Administrators, "The Changing Role Of The Principal," illustrates this point.[10/] A legislative program analysis describes 12 program requirements in 27 disparate areas (see Appendix D). This analysis, which presents an overwhelming number of requirements, is incomplete. (For example, neither collective bargaining nor bilingual program requirements is included.) Not surprisingly, the analysis is already out of date.

Effective school leadership may not be possible unless principals receive additional support and assistance. Many principals were trained at a time when high priority was given to management behaviors that no longer work. Other principals have operated in district structures that have limited their opportunities to develop the requisite leadership skills.

Clearly, a major effort must be made to redefine the role of the principal, assure every principal the opportunity to be fully prepared for the demands in that role, and hold the principal accountable for defined leadership tasks.

The task force has concluded that in order to ensure that school principals develop the skills, abilities and awareness necessary for effective leadership major changes must occur in five areas: pre-service training; recruitment and selection; continuing professional

development; support services; and evaluation. Our discussion of each of these areas will include specific recommendations for the Legislature, professional organizations, school districts and counties, state agencies, colleges and universities and local educators to increase administrator effectiveness.

III. PRE-SERVICE TRAINING AND CREDENTIALING

According to many principals, their academic training did not prepare them for their responsibilities as school administrators.

In California studies based on extensive interviews, elementary school principals attributed their success in their jobs to two types of practical experience: (1) experience as a classroom teacher and (2) on-the-job experience as a principal. Less than two percent singled out college or graduate preparation as an important determinant of their success in the role.[11/]

Secondary school principals are no less critical of their preparation. When asked to rate six subjects ordinarily required for administrative certification, most secondary principals in one survey felt that only one course, supervision of instruction, was absolutely essential for the beginner. Similarly, 72 percent reported that they have not found a single textbook on school principals to be of any practical value in guiding their day-to-day behavior.[12/]

These studies were conducted in 1976, prior to a number of legislative and administrative changes in administrative credential programs. It remains to be seen whether credential programs developed under the "Ryan Act" (Chapter 557, Statutes of 1970) better match training to job requirements.

Current Training and Credentialing Programs

Pre-service training programs for school administrators are conducted at 42 institutions of higher education in California. They offer courses in different settings and time frames, for example, day classes for full-time students, evening classes for working professionals, supervised

field experience and internships.

Nearly 40 of these institutions have training programs which have been approved by the Commission for Teacher Preparation and Licensing. Students who complete these training programs can receive an administrative services credential which enables them to serve in an administrative capacity in public schools.

Current law also provides for credentials to be awarded based on passing a written administrative services examination.

In either case, administrative services credential applicants must also hold a valid teaching or pupil personnel credential and have at least three years of successful teaching or counseling experience.

Approved pre-service programs are required to include course work designed to develop a prescribed series of competencies. The commission periodically issues a "scope and content statement" for use in developing administrative credential programs (see Appendix C, p. 67). Institutions are to use these statements as guides as they describe in a proposed plan the skills they expect to produce in their graduates; how this will be done; and how they and the commission will know it has been done. The commission then assesses the programs to see if they are operating according to each institution's approved plan.

Problems with the Current Credentialing Structure

The current licensing system lacks high standards in evaluating the adequacy of a candidate's preparation.

Current law does not emphasize competency-based preparation nor has the commission exerted leadership to do so. The competency areas adopted by the commission are broad in scope. For example, one competency

area says, "Insight into personal values and perspectives." Another reads, "Basic psychological principles." According to commission staff this is done to facilitate local innovation and to provide flexibility for shifting needs in education. However, the competency statements are so broad that programs may be approved even when they include requirements which are neither specific nor easily measurable. It is difficult for the commission and the institutions to determine whether these programs provide necessary training experience. Where professional competency requirements cannot be evaluated, there may be little basis for determining quality; responsibility for program oversight, which should be shared by the commission and preparation institutions, may go unmet.

Second, administrative credential candidates may not be required to go through a sustained field experience which will give them an opportunity to experience the demands placed on the administrator.

Little effort is made to identify exemplary principals and assign field work candidates only to the masters in the profession. All administrative services credential programs must provide field experience for their candidates; however, administrative candidates do not necessarily serve in a manner comparable to "student teaching" where the individual is responsible for a task and is supervised while performing it. Instead, they often work as staff to an administrator while they complete a specific project of importance to the school. Although such activities may be of service to the school they may not prepare the credential candidate for performing the complex combination of informational, interpersonal and decisional roles of a school principal.

Finally, the current examination process is inadequate to measure the competence of administrator credential candidates.

Over 9600 persons took the designated administrative examination in 1977; an estimated 40 percent passed. Two years ago a college sophomore took the test by mistake and passed with an excellent score. Since the examination is a national one, candidates need not demonstrate any knowledge of California law, finance or school organization in order to receive a passing score. No field experience is required of those taking the examination.

Recommendations for the Improvement of Pre-Service Training and Credentialing

1. We recommend that the Legislature revise current law to require the Commission for Teacher Preparation and Licensing, in conjunction with representatives of postsecondary educators and school administrators, to: (a) identify competencies necessary for being an effective school leader (using Appendix A on p.54 of this report as needed); (b) devise techniques and procedures for approved institutions to measure identified competencies; (c) regularly update competencies and other credential guidelines to reflect changing requirements.

2. We recommend that postsecondary institutions which offer administrator credential programs ensure that:

(a) Required courses include specific learning activities centered around identified competencies;

(b) Professors of school administration receive ongoing professional development regarding the changing role

and responsibilities of the school principal;

(c) Exemplary school administrators are encouraged to work as part-time professors of school administration;

(d) All credential candidates have opportunities to complete field experiences, under the direction of exemplary principals, which will allow the candidate to acquire identified competencies;

(e) Credential candidates have mastered identified competencies in the field before they are recommended for credentials.

3. We recommend that the Commission for Teacher Preparation and Licensing ensure that its assessment process determines whether administrator credential candidates have adequate opportunities to master identified competencies.

4. We recommend that the Legislature eliminate the option of obtaining the administrative services credential through the existing examination process, and require all credential candidates to demonstrate competence in the field.

5. We recommend that the Commission for Teacher Preparation and Licensing, in cooperation with appropriate postsecondary institutions, report to the Legislature within three years on the implementation of these recommendations.

IV. RECRUITMENT AND SELECTION

The Current Process

When interviewed about their recruitment and selection procedures for school principals, districts report that they generally follow a procedure which includes: establishing criteria; advertising the position, either within district, through the Association of California School Administrators, and/or through institutions of higher education; screening applications; interviewing candidates; and selecting the principal. When hiring principals, school districts do not always use written procedures and criteria.

Problems with Current Process

Existing recruitment and selection procedures for choosing a principal do not always result in the selection of the most competent person.

First, many districts allocate resources which are insufficient to adequately evaluate a candidate's strengths and weaknesses. Many industries use sophisticated techniques to select managers and executives before making costly investments in training, salary and benefits. Schools contain society's most precious commodity, yet districts do not always interview principal candidates to detect beliefs or attitudes that may make a person unsuitable to serve children.

Second, seldom does the selection process require the candidate to demonstrate competence in the field. More than 70 percent of school administrators in California are over the age of 55. Although the state will have an influx of new principals in the coming decade, many school districts are not carefully assessing the candidate's ability to deal

with the complex, demanding role of the principal.

Third, the selection process does not ensure that the search is broad and the applicant pool reflects qualified persons, including minorities and women. In some districts:

(a) Administrative positions are filled without their being advertised either within or outside the district;

(b) Jobs are filled with persons who are "sponsored" by the superintendent or by others, rather than as a result of a bona fide open search;

(c) Job descriptions used for recruiting principals are inadequate to describe the demands of the position being advertised;

(d) Where selection criteria are developed, criteria are not always developed with the assistance of, nor do they respond to, the school community's needs;

(e) Affirmative action requirements, when followed, may be satisfied pro forma rather than as a means toward a fair evaluation of all candidates.

Criteria for an Effective System

The hiring of school principals is, and should remain, a local prerogative. For this reason, most of the responsibility for ensuring that the best individual is hired for the position rests with the school district. Nevertheless, a number of changes may be needed in local procedures to facilitate identification and selection of the best qualified persons. District selection and recruitment processes should ensure that:

1. Selection criteria are responsive to the needs of the school site community;

2. Every job opening is advertised adequately;

3. Announcements of job openings include a clear description of the requirements for the position;

4. Sufficient time is available for applicants to respond to the announcement of the job opening;

5. Full use is made of existing placement services of county offices, universities and professional associations;

6. The candidate pool adequately represents diverse qualified personnel, including women and minorities;

7. The selection process includes evidence of the candidate's ability to function as a principal rather than simply written information and interviews regarding his or her abilities.

Selection processes should measure a variety of behaviors related to success as a principal. Techniques developed by "assessment centers" could assist districts to develop comprehensive selection procedures. Widely used by business, industry and many governmental agencies here and abroad, assessment centers measure skills needed for success as a supervisor, manager or administrator.

Originated for use in industry by A.T.&T., the method has proved to be highly predictive of subsequent success in management. More than a quarter of a million men and women have participated in assessment centers worldwide and the number of assessment applications is

multiplying rapidly. Over 50 research studies have demonstrated the technique's effectiveness in a variety of environments, including schools, colleges and universities as well as the business world.[13/]

In a typical assessment center, 12 individuals are evaluated by a staff of 4 to 6 trained assessors. The assessees are candidates for one of a number of personnel actions -- selection, promotion, placement or development. Measurement techniques include group exercises, simulated problem-solving interviews, and such traditional methods as interviews and tests.

> The key to the assessment center process, however, is the use of simulations tapping a wide variety of behaviors. Each participant is observed as he goes through the assessment exercises, reports are prepared by the assessors and each individual's performance is evaluated on a number of dimensions. Commonly used managerial and administrative dimensions include such skills as: leadership, decisionmaking, oral and written ability, problem-solving and organizing ability. Reports summarizing performance are provided to both the participant and the sponsoring organization.[14/]

In 1975 pilot assessment centers were created in two Virginia school districts under the sponsorship of the National Association of Secondary School Principals and the American Psychological Association. To assess administrative potential, five exercises were chosen -- four simulations and a personal interview. The assessment process requires 10 hours of participant activity, 6 hours of which are observed by assessors. Two of the simulations require the participant to play the role of a newly appointed principal in a fictitious school. Background information is made available to the participant and a package of mail, reports and memos presented for handling.

Another simulation involves the analysis and group discussion of a case study. The case concerns the problems faced by a fictitious

school and the community it serves. Finally, there is a fact-finding and decisionmaking simulation. In this exercise the participant is given a small amount of information about a problem. The task is to ask questions of a resource person in order to develop an understanding of the problem and recommend a solution.

Assessment handbooks, videotapes and lab materials were produced for the Virginia training program. Assessors, all of whom are experienced administrators, were given training in the assessment technique. Following a three-year project review, the sponsors were satisfied that "used properly, the assessment center technique can be quite effective in helping to identify administrative talent for public schools." A similar project in California would cost approximately $120,000.[15/]

Although we believe that regional centers could assist school districts to develop comprehensive, effective selection procedures, we do not recommend creation of separate centers. California does not need additional bureaucracies. Instead, we suggest that one or more existing regional structures be used on a pilot basis to provide coordinated selection procedures including proven assessment techniques. Regional structures which could be used are county offices of education and staff development resource centers created by AB 551-Hart (Chapter 966, Statutes of 1977).

Recommendations Regarding Recruitment and Selection of School Principals

1. We recommend that school district governing boards establish written policies for the recruitment and selection of school principals which reflect community needs and which provide for a thorough, open and extensive search.

2. We recommend that the Legislature, in conjunction with school districts, county offices of education and colleges and universities establish pilot projects to assist selected school districts to recruit and select administrative personnel. These projects could: (a) gather and organize information regarding techniques for selecting and evaluating management personnel; (b) serve as a clearinghouse for candidates and districts; (c) assist districts in evaluating candidates according to competencies prescribed by such districts; (d) conduct national searches for qualified candidates for job openings; (e) conduct research regarding improved techniques for evaluating administrative talent; (f) train appropriate central office administrators in needs assessment and recruitment and selection procedures which are necessary for hiring principals. Pilot projects could be conducted through county offices and/or staff development resource centers created by AB 551-Hart (Chapter 966, Statutes of 1977).

3. We recommend that the Legislature request the Legislative Analyst to report to the Legislature within two years of the progress made by districts in implementing recommendation number one regarding written policies for recruitment and selection of principals.

V. CONTINUING PROFESSIONAL DEVELOPMENT

The recent and dramatic changes in the role and responsibilities of school principals have caused a shift in the competencies required to do the job. Many principals now serving California schools were trained prior to the current emphasis on school improvement, cultural pluralism, community involvement, educational opportunity, special education, student rights and collective bargaining. These principals need opportunities to develop the new abilities and skills necessary for effective school leadership today.

Even those principals recently trained find the role of principal to be complex and dynamic. Each community shapes the values, interests and aspirations of its children. Pre-service training, particularly in times of limited staff turnover, cannot fully prepare administrators and other school staff to meet the diverse and changing needs of the pupils they serve.

Research indicates that ongoing staff development is critical to effective school programs.[16/] For these reasons, all principals and other school staff should have continuing opportunities to develop and upgrade skills and abilities necessary for effective schooling.

The Current System

Continuing development for principals is funded in selected districts by the state through categorical programs.[17/] Professional associations, such as the Association of California School Administrators, offer a substantial number of workshops and institutes for administrators.[18/] Guidelines adopted by the Commission for Teacher Preparation and Licensing require institutions of higher education which offer the administrative

services credential to include a program of in-service training. Universities and colleges also enroll administrators in a range of courses and workshops which meet requirements for credit toward advanced degrees. Several school districts and county offices of education have established continuing development programs specifically for administrators.[19/]

Problems with the Current System

Despite state and local efforts, support for comprehensive continuing development for principals is inadequate. Teachers, administrators and parents agree that, while staff development is an important concern for school districts, many in-service activities are irrelevant and ineffective. Although fine programs do exist, they reach few practitioners.

There is no state staff development system which is applicable to all school level administrators. Few districts operate under policies and programs which systematically provide principals with skills such as those identified in Appendix A of this report (p. 54), "Skills and Competencies Needed for the School Principal." Funding for in-service activities is generally neither sufficient nor stable.

School personnel and researchers agree that there is no model underlying most professional development programs. "Administrator professional development" is often comprised of uncoordinated workshops and courses. Training tends to be singleshot and thus fragmented. Activities often occur outside the school day, away from the school site, and independent of individual administrator needs and school improvement goals.

Typically, professional development programs operate under a "top-down" system. The central office or the institution of higher education determines the format and content of the training activity. There is

heavy reliance on the lecture-consultant format. Participants are placed in a receptive role with little opportunity to identify their training needs or design and evaluate training activities. There are few incentives for principals to participate in continuing professional development.

Publicly funded programs are often standardized across a school district. Seldom are professional development activities designed to allow for individual learning or choice among learning activities. The mode of training usually requires accumulation of knowledge to be used at a later date; training is seldom coupled with "hands on" demonstrations, supervised trials and feedback.

Criteria for an Effective System

What does an effective model of continuing professional development look like? Research and experience with successful California programs confirm what many administrators knew all along -- effective professional development for principals is:

1. Systematic, concrete and relevant to an administrator's responsibilities on the job. Programs are designed to develop and increase the skills necessary for effective school leadership today. In-service activities deal with the identified needs of the individual, district and school and are applicable and usable.

2. Ongoing and individualized. Through continuous planning, principals play an important role in identifying what their training should be. Planners recognize that participants bring to the job different competencies, aptitudes, needs and interests; therefore, the program is

tailored to meet the needs of the individual, consistent with schoolwide improvement goals and district objectives.

3. Flexible and able to be changed as needs change. The process allows participating principals to say, "Something is not working" or "It is working." Program methods are revised over time, based on whether the experience assists participants in achieving identified goals.

4. Conducted when participant energy level is high. District policies recognize that: (1) all professionals have an obligation to commit time and energy to their professional improvement, and (2) since ongoing professional development is essential to effective schooling, time should be set aside for this purpose throughout the school year, including continuing release time.

5. A system which makes full use of existing human, fiscal and material resources, including the energy and experience of school principals, university faculties and business and professional associations. Ideally, the program uses talented local people who are credible, knowledgeable in the given training area and communicate effectively. The process provides opportunities for peer interaction and peer review.

6. An integral part of school district policies and practices and is supported by adequate, stable funding.

Administrator professional development which meets these criteria is available to a limited number of school principals under legislation enacted in the 1977-78 session. AB 551-Hart (Chapter 966, Statutes of 1977) and AB 65-Greene (Chapter 894, Statutes of 1977) provide state funds for school staff development programs, including administrator

professional development. State and federal funds are also provided through AB 551 for a limited number of school resource centers, allowing some school districts and county superintendents of schools to establish consolidated staff development programs for administrators, teachers, and other school staff under the model described above.

The opportunities provided through AB 551 and AB 65, however, are limited by funding levels. In addition, resource centers are governed by a policy board, the majority of which are classroom teachers. Many principals contend that governance of administrator professional development should provide for greater involvement of school site administrators.

In short, activities provided under AB 551 and AB 65 and other state and private programs which meet the criteria above are not sufficient to ensure that all school principals have continuing opportunities to acquire and improve the skills necessary for effective school leadership.

Recommendations Regarding Administrator Professional Development

1. We recommend that all school districts and county superintendents of schools develop written policies and practices to support ongoing professional development for each school principal, to meet the "Criteria for an Effective Program" described above. We encourage associations of school board members and administrators and the State Board of Education to lend their support and encouragement to this end.

2. We recommend that all school principals enter into an ongoing, individualized professional development program consistent with district objectives, school improvement goals and the needs of the pupils they serve.

3. We recommend that the Association of California School Administrators create a task force in conjunction with the dean of each school of education administration and representatives of practicing school principals to design and implement professional development activities consistent with the criteria described above.

4. We recommend that the Legislature revise and expand enacted legislation (AB 65 and AB 551) to encourage and fund professional development for school principals consistent with the criteria described above.

5. We recommend that the California School Boards Association and administrator professional associations, together with one or more local school districts, county offices of education and colleges or universities create an exemplary professional development program for principals, to serve as a model to other districts and counties.

6. We recommend that the Legislature modify funding formulas for public universities to allow field-based administrator professional development consistent with the criteria described above.

7. We recommend that the Legislative Analyst report to the Legislature within two years regarding the implementation of recommendations 1, 2, 3 and 5 above.

VI. SUPPORT SERVICES

Many principals are being asked to manage a host of new educational programs developed at the state and district levels, and to develop school level programs in response to local needs. At the same time, they are being asked to modify their management style by sharing decision-making with parents, students, teachers and community members.

These changes in responsibility are not always met with support and assistance from school districts, county superintendents of schools or universities. Some principals are finding that they face an increasingly complex role with limited opportunities to gain requisite leadership skills, receive technical assistance, or share ideas and resources with others.

The degree of assistance and support directly affects the principal's ability and willingness to make decisions and bear risks. Principals, like classroom teachers, can find themselves isolated and overwhelmed. As a result, some principals try to do everything while others react by doing as little as possible.

> The principals interviewed were almost unanimous in stating that they needed outside help and training to do their jobs better, especially if their authority is broadened to include budget discretion and planning. Practical, on-the-job training was preferred over more formal training. A recurring theme was the need for support from the central office, particularly with difficult personnel problems and with supplies.20/

An Effective System

The key to an effective system of principal support is district organization. If the principal is to be an instructional leader, the district must be organized to encourage and support principal leadership

in instruction. A district plan for instructional improvement should identify specific tasks for principals. District resources, including information, materials, money and people, should then be coordinated to accomplish these tasks. Technical assistance should be provided on a timely basis in areas such as team building; program planning, development and evaluation; personnel evaluation and staff development. Personalized staff development which meets the criteria under Section V of this report and which is consistent with the district instructional improvement plan should be available to all principals. Principals should receive regular review and feedback as to their success in accomplishing instructional improvement tasks.

The skills needed to provide such technical assistance and training are available among principals, district staff, county offices, the State Department of Education, professional organizations and college and university faculty. The job is one of coordinating resources to link principals and others who possess the needed skills with those who need training and assistance. This job rests primarily with the school district except for those direct service districts which receive services from a county office of education.

As districts organize to support principals they should consider establishing a regular forum for principals to share, think and plan with others, in particular with other principals.

Recent research suggests that successful school improvement projects give school level staff the skills to identify and solve problems themselves.[21/] As program development is shifted to the school level in order to respond better to local needs, principals have a key resource to share with each other and with district personnel. They often know

the school and how it operates better than anyone else. Districts can benefit, therefore, by recognizing principals as a resource in problem identification and resolution. The task is then to create settings in which principals can share ideas and cooperate in solving problems.

Districts should also consider providing for administrative aides, particularly in schools where the principal is without a vice principal or dean. An aide, such as a college student or a retired person, would function like a teacher aide, assisting with routine tasks such as scheduling and paperwork. Aides with more extensive training, such as administrator credential candidates, could assist with instructional leadership, school advisory committees or school management functions. In either case, principals would have more time to assist teachers, manage the school and participate in professional development activities.

Recommendations for Improvement of Administrative Support Systems

1. We recommend that school districts, county offices of education and colleges and universities organize to support principal leadership by:

(a) Establishing and regularly updating a districtwide plan which specifies tasks required of school principals;

(b) Coordinating personnel, material and fiscal resources to provide principals with timely assistance needed to accomplish specified tasks;

(c) Providing ongoing, personalized professional development programs for principals which meet the criteria under Section V of this report (p. 32).

(d) Conducting regular reviews of principal performance vis-a-vis specified tasks and providing assistance when needed.

2. We recommend that school districts and county offices of education, in conjunction with site administrators, establish principal consortia to enable principals to share ideas and resources, provide personal support and involve principals in decisions that affect their ability to manage a school.

3. We recommend that districts consider providing for administrative aides, particularly in schools where the principal is without a vice principal or dean.

4. We recommend that the Legislative Analyst report to the Legislature within three years regarding the implementation of recommendations 1, 2 and 3.

VII. EVALUATION OF SCHOOL PRINCIPALS

The Current System

Since 1972 every school district has been required by law to evaluate administrators on a regular basis. In many school districts evaluation of administrators has followed the same pattern as that for teachers. Principals, like teachers, are expected to write objectives for their work, have these objectives approved by their supervisor, and be evaluated regularly consistent with these identified objectives.

Problems with the Current System

The evaluation of principals, as described by principals, is inadequate in many districts. Some principals report: (1) little knowledge of criteria used by supervisors to evaluate them, (2) infrequent evaluations, (3) judgments by supervisors which are seldom based on direct observation, (4) little involvement of those to whom their work was most visible -- teachers, students, parents and other administrators, (5) primary attention is given to minor objectives, such as "accuracy and punctuality in submitting reports" and maintaining an attractive school.[22/] Thus, in some districts the effectiveness of school principals is too often measured by their ability to "keep the lid on" and serve the needs of the school district bureaucracy. "When there are no problems, there are no questions," explained one principal. "We usually only hear about our mistakes."[23/]

An Effective Evaluation System

A set of criteria is needed which can be used to evaluate the principal's ability to provide leadership to the school.

Such criteria should themselves have certain characteristics:

1. They should be clearly set forth and commonly understood by the Board of Education, district administration, school site council, teachers and other staff members, students and the principal. The principal should play a major role in their formulation.

2. They should be based on performance, that is, the criteria should deal specifically with how the principal performs his or her leadership role at the school and not what the principal says, for example, at district meetings.

3. They should provide for regular, visible review responsive to local needs and school clients. Student populations vary; educational needs and wants differ from community to community. Therefore, specific criteria and procedures should be developed by each principal within a districtwide evaluation framework applicable to all principals.

4. They should provide that those to whom the administrator's work is most visible, such as peers, teachers, students and parents, are involved in the evaluation process.

5. They should be fair, equitable and should speak to obtainable goals for each individual principal. Peter Drucker in his book, The Effective Executive, points out that no industry or institution has a cadre of "super-leaders".[24/] Rather, there are human beings, well-

meaning but often fallible, who occupy leadership positions. Evaluation of principals, like evaluation of teachers and students, should be viewed as assisting the principal to be more effective. Thus, performance evaluation is a formative process which includes comments from the person evaluated.

6. Evaluation criteria, themselves, should be formative; that is, as conditions change, criteria of effectiveness should change also. Principals should be involved in assessing the need to change the criteria.

While there is no exclusive set of criteria for the evaluation of all school principals, there are general areas of school leadership which can be used in the design of general criteria for the evaluation of all principals. Such areas are derived from Appendix A of this report, "Skills and Competencies Needed for the School Principal" and presented in Appendix B (p. 63). They are meant to be exemplary only and to be used as individual principals and localities determine they are appropriate.

Recommendations for the Improvement of Principal Evaluation

1. We recommend that all school districts establish policies regarding the evaluation of school principals which meet the criteria established in Section VII (p. 42). We recommend that the California School Boards Association lend their support and encouragement to this effort. We recommend that the Legislature request the Legislative Analyst to monitor the implementation of this recommendation over a three-year period, and, if necessary, develop legislation to ensure timely implementation following the three-year review.

2. We recommend that the State Department of Education establish a base of information regarding the substance of, and procedures for, the evaluation of school personnel, including school principals. We recommend that the resource base be developed with the assistance of county offices of education, school districts, colleges and universities and organizations of administrators and school board members.

3. We recommend that county offices of education, school districts, colleges and universities, and administrator and school board associations design and conduct staff development for central district administrators and others in the evaluation of school administrators based on the criteria established in Section V (p. 32).

4. We recommend that the Legislature, the State Department of Education and colleges and universities support research regarding the effectiveness of school principals which will lead to the refinement of the criteria established in Section VII (p. 42).

VIII. RECOMMENDATIONS FOR FURTHER STUDY

Competent teachers are essential to successful schooling and citizen confidence in public education. Recent studies indicate that the way a teacher conducts class is a major factor in a child's early educational growth and development -- more important than the child's skills or the quantity and quality of instructional materials.[25/] Teachers must be encouraged to develop and refine effective teaching skills. Principals should be able to evaluate instructional competence, assist staff who seek to improve and remove those who will not. However, principals in general are criticized as unable to evaluate and assist teachers.

A preliminary examination of the current system of teacher evaluation reveals the following:

1. Many school administrators and district administrators do not understand all the rules and procedures governing employee evaluation. An examination of hearing records shows that many dismissal cases are lost as a result of simple procedural errors, such as untimely notification or improperly filed papers.

2. Too many administrator training programs do not adequately prepare credential candidates in personnel evaluation. Some candidates are given scant information about the law and little opportunity to work with principals who can demonstrate effective evaluation procedures. As a result, some principals are not knowledgeable about good teaching skills, nor how to assist teachers who want to improve.

3. Many principals do not receive assistance in personnel evaluation from the district office. The need for in-service training in

effective evaluation far exceeds the availability of this training. Of note is the need for in-service programs which similate court hearings. Even principals who have carefully documented teacher incompetence can be shaken during cross-examination and a case which should have been won is lost.

4. Some school districts have accepted contract provisions which weaken the personnel evaluation process. For example, some contracts require the principal to give the employee 24-hours notice before each classroom visitation, or allow employees to file a grievance regarding the content, not just the process, of evaluation. As a result, the principal's observations become less frequent and evaluation reports less specific and of limited value.

5. Many principals have no control over the selection and assignment of staff. This lack of authority can erode a principal's ability to hold staff accountable for their performance.

6. In general, many of the principals hesitate to exercise their authority. They often wait too long to initiate dismissal proceedings, or devote too much energy to salvaging incompetent probationary employees. Once a case is lost on procedural grounds, some principals are unwilling to pursue dismissal a second time.

7. Some union officials, who are interested in gaining and retaining members, provide attorneys for every member facing dismissal, including teachers in whom the union has little confidence. The case will usually be pursued through the courts where the principal must produce a procedurally perfect case with extensive documentation.

8. Close political relationships between some union officials and school board members can thwart conscientious principals. As campaigns for school boards become increasingly expensive, some candidates may depend on contributions from employee unions. A principal who has carefully documented instructional incompetence can find this effort eroded by tacit understandings between union leaders and the board members they have supported.

Many of these problems are not easily resolved. Certainly, school districts, together with county offices of education and professional associations, should ensure that all school principals are knowledgeable regarding rules and procedures for the evaluation of teachers, good teaching skills and ways to assist teachers who want to improve.

In addition, the task force recommends that the Legislature review the current system of personnel evaluation and support with assistance from representatives of school districts, administrator and teacher professional associations, colleges and universities and the public.

IX. CONCLUSION

Principal leadership is directly related to pupil achievement, pupil attitudes toward self and school, teacher morale and parent satisfaction. Many principals are facing dramatic changes in role and responsibility without support and assistance for adjusting to these changes.

A major effort must be made at state and local levels to define the role of the principal, assure every principal adequate support and assistance, and hold the principal accountable for defined tasks. The task force has made specific recommendations to the Legislature and educators as to how to improve administrator effectiveness. Thoughtful implementation of these recommendations can lead to improvements in education for California public school pupils.

FOOTNOTES

I. INTRODUCTION: THE PRINCIPAL AND SCHOOLING

1. United States Congress, Senate Select Committee on Equal Educational Opportunity, Toward Equal Educational Opportunity, a report pursuant to Senate Resolution 359, February 19, 1970 (Washington, D.C.: Government Printing Office).

2. a. California, Department of Education, Office of Program Evaluation and Research, School Effectiveness Study: The First Year, (Sacramento, California, 1977) p. 22.

   b. P. Berman and M. McLaughlin, Federal Programs Supporting Educational Change (Santa Monica, California: Rand Corporation, April 1975).

   c. Analysis of the School Preferred Reading Program in Selected Los Angeles Minority Schools (Santa Monica, California: Rand Corporation, 1976).

   d. New York, Office of Education Performance Review, School Factors Influencing Reading Achievement: A Case Study of Two Inner City Schools (New York: 1974) pp. 11-13.

   e. George Weber, Inner-City Children Can Be Taught To Read: Four Successful Schools, Council for Basic Education, Occasional Paper #18, October 1971. Quoted in Rita Mize, The Effects of Principal Behavior Upon Teacher Performance in High and Low Achieving Schools, Unpublished Ph.D. dissertation, University of California, Berkeley, 1976, Chapter I.

   f. California, Department of Education, Interim Report on the Special Study of Selected ECE Schools with Increasing and Decreasing Reading Scores (Sacramento: 1977), pp. 2, 17 and 18.

3. P. Berman, in testimony before the Assembly Education Committee, November 15, 1976. Reference is made to P. Berman and M. McLaughlin, Federal Programs Supporting Educational Change (Santa Monica: Rand Corporation, April 1975).

4. Legislative approval was granted in House Resolution No. 42 of 1977.

5. A complete list is given in Appendix E, p. 72.

6. The Field Institute, State and Local Government Spending in the Wake of Proposition 13's Passage - Views of the California Public, Report #78-004 (San Francisco, California, June 1979).

7. Ibid.

II. THE PRINCIPAL'S CHANGING ROLE

8. Chapter 894, Statutes of 1977, authored by Assemblyman Leroy F. Greene.

9. E. Mark Hanson, "The Modern Educational Bureaucracy and the Process of Change," in Educational Administration Quarterly, Vol. II, No. 3 (Autumn 1975) pp. 21-26.

10. T. Amato, et al., The Changing Role of the Principal, Association of California School Administrators (Burlingame, California, April 1978), p. 10. The Legislative Program Analysis was prepared by the Office of the Los Angeles County Superintendent of Schools. (See Appendix D, p. 71.)

III. PRE-SERVICE TRAINING AND CREDENTIALING

11. Edwin W. Bridges, "Administrative Preparation: A Critical Appraisal," in Thrust for Educational Leadership, Association of California School Administrators, Vol. 5, No. 4 (March 1976) p. 3.

12. Ibid.

IV. RECRUITMENT AND SELECTION

13. a. J. R. Huck, "Assessment Centers: A Review of External and Internal Validities," Personnel Psychology 26 (1973) pp. 191-212.

b. Howard, "An Assessment of Assessment Centers," Academy of Management Journal 17, No. 1 (March 1974) pp. 115-134.

c. Cohen, J. L. Moses and W. C. Byham, The Validity of Assessment Centers: A Literature Review - Monograph II (Pittsburg, Pennsylvania: Development Dimensions Press (1974)).

14. J. L. Moses, "Developing An Assessment Center Program for School Administrators," in NASSP Bulletin, National Association of Secondary School Principals (September 1977) p. 77.

15. J. L. Moses, et al., "The Technical Assistance Program," Report to the 84th Annual Convention of the American

Psychological Association, Washington, D.C. (September 4, 1976). (Amount adjusted for inflation 1976-1978).

V. CONTINUING PROFESSIONAL DEVELOPMENT

16. a. Berman and McLaughlin, op. cit.

b. Rand Corporation, Analysis of the School Preferred Reading Program, op. cit.

c. Michigan, Department of Education, Report of the 1974-75 Cost Effectiveness Study (Detroit, 1975)

d. California, Department of Education, School Effectiveness Study, op. cit.

e. Educational Testing Service, Beginning Teacher Evaluation Study (San Francisco Far West Laboratory for Educational Research and Development, 1975).

17. Including Educationally Disadvantaged Youth (EDY), Elementary and Secondary Education Act, Title I (ESEA, Title I), and the Chacon-Moscone Bilingual-Bicultural Education Act of 1976. Staff development is also required under The School Improvement Program established by AB 65 (Chapter 894, Statutes of 1977).

18. Last year, ACSA presented over 250 conferences, regional activities and workshops for which the total attendance was over 27,000 persons, a figure which includes many persons who attended multiple events. The most intensive program is called Project Leadership, which is individualized, extends over a year and involves site visits to participating administrators by other professionals.

19. For example: (a) The Center for Educational Administrator Development (CEAD), sponsored by the Orange County Department of Education, provides professional development for principals in cooperation with 18 school districts in four southern California counties.

(b) The League for Educational Administrator Development (LEAD), developed by eight county offices of education in the greater Sacramento area, provides administrator in-service training in cooperation with 30 school districts and California State University, Sacramento.

VI. SUPPORT SERVICES

20. San Francisco, Public Schools Commission, The Role of Principals, Report and Recommendations (San Francisco: May 1976) p. 7.

21. Rand Corporation, Federal Programs Supporting Educational Change, op. cit.

VII. EVALUATION OF SCHOOL PRINCIPALS

22. T. E. Deal, S. M. Dornbusch, and R. A. Crawford, Evaluating Principals - Applying A Theory of Evaluation (Cambridge: Harvard University, 1976).

23. Ibid., p. 11.

24. P. F. Drucker, The Effective Executive (New York: Harper and Row, 1967) p. 18.

25. Stanford Research Institute, Annual Report (Menlo Park, California: Stanford Research Institute, 1977) p. 9.

APPENDIX A

SKILLS NECESSARY FOR SCHOOL LEADERSHIP

The task force has identified the following skills and abilities as necessary for effective school leadership today: instructional skills, management skills, human relations skills, political and cultural awareness, leadership skills and self-understanding.

1. Instructional Skills

The main purpose of schooling is to educate children, youth and adults. In short, schools are to be places of learning. It then follows that the main function of the principal is that of instructional leader.

The principal cannot be expected to have in-depth knowledge in all subject areas. Neither can he or she keep abreast of all developments in the field of curriculum and instruction. Nevertheless, the principal should have three basic sets of instructional competencies: (a) the ability to monitor classroom instruction, (b) the ability to work with teachers and others to plan and organize the instructional program, and (c) the ability to identify, acquire and coordinate the resources necessary for instructional improvement, including staff development.

a. The monitoring of instruction requires that the principal visit classrooms frequently. It requires that observations focus upon critical questions such as:

--Is the content of instruction and are the materials used appropriate for the ability levels, interests and ethnic backgrounds of individual students?

--Do the students have an understanding of the objectives of the lesson(s)?

--Do students have an opportunity to practice the skills and abilities they are supposed to be learning?

--Do students receive feedback on how they are doing?

--Do teaching strategies match individual pupil learning styles?

--Do students have some opportunity to decide their own modes of learning?

These and other principles of learning become the key focus of the principal as he or she works with teachers. Needless to say, the principal has a role in the evaluation of teachers. More importantly, the focus of the principal should be on causing teachers to become aware of their own skills and abilities and on creating an environment in which the teachers try to improve those skills and abilities.

b. While the principal has primary responsibility for monitoring instruction at the classroom level, he or she also is responsible for the overall curriculum of the school. In this case, the principal must provide leadership to answer the following kinds of questions:

--Does the school have an articulated set of goals for the education of students in that school?

--Do the course offerings at the school lead toward the accomplishment of these goals for each student?

--Is there an appropriate sequence of skill or ability development at the school which is responsive to differing student abilities, while helping each student to achieve his or her potential?

--Are learning activities based on staff understanding of student physical, emotional and psychological growth characteristics?

--Are course offerings comprehensive enough to account for the varied interests and backgrounds of all students?

--Are the necessary resources (e.g., materials, personnel) available to accomplish the goals of the school?

--Is there a formative or ongoing process of evaluation and planning which allows for continued improvement of the instructional program?

c. The principal cannot possibly do all of these things alone; however, he or she must understand the elements needed for good programs in the classroom and at the school. With such an understanding, the principal needs to be aware of those resources available which can assist individual teachers and groups of teachers in their improvement efforts. District and county offices, colleges, universities, publishers, research and development centers are examples. Of course, the most important resource is teachers, those at the school and those in neighboring schools.

2. Management Skills

The first priority of any leader is to get the job done. Today, principals are being asked to get the job done while sharing management and decisionmaking. Management skills particularly important in this context include communication, group problem-solving and decisionmaking skills.

As program planning and development is shifted to the school level, principals must encourage communication among teachers, parents and students. The task is to establish well-defined patterns of organization, channels of communication and methods of procedure consistent with state law and district policies.

A related task is to keep the energies of planners focused on shared goals. As the principal works with several school constituencies, he or she must recognize that conflict can lead to beneficial change. The principal must be able to facilitate group process to effect a positive resolution out of conflict.

The principal is responsible for translating school improvement objectives into student-centered programs. California law holds the principal responsible for "the promotion of full and effective compliance" with the locally developed school improvement plan.

In this context, decisionmaking competencies include the following. The principal:

--recognizes when a problem exists and is able to identify it correctly;

--clarifies problems through acquisition of relevant information;

--determines what is fact and what is opinion;

--assigns priorities to completion of problem-solving tasks within a specified period of time;

--seeks, identifies, and evaluates alternate solutions;

--understands types of decisions which can be made, e.g., terminal, interim, conditional, and the likely consequences of making each type of decision;

--seeks more information when it is necessary for solving a problem;

--understands legal, economic, sociocultural, and policy limitations of the decisionmaking process;

--distinguishes between decisions that are and those that are not one's direct responsibility in reference to both superior and subordinate personnel;

--establishes procedures for decisionmaking in which community representatives, faculty, and students are active participants;

--involves those persons who will implement the results of a decision in the making of that decision;

--clarifies the commitments resulting from a decision to those who will carry it out and to those it will affect;

--reviews decisions to determine whether they should be retained,

modified or retracted.

Management skills can be used for improvement or they can be used to maintain the status quo. Needs assessment serves as a good example.

Needs assessments can result in true community, parent and teacher involvement in school level decisionmaking. On the other hand, needs assessments can amount to a form of tokenism if participants are not representative of the school community or if school programs do not reflect identified needs.

In the case of needs assessments, the question the principal must ask is, "How can we use this process as a means of identifying more appropriate goals for this school and how can this process assist us in better reaching our goals?" Related questions include, "Who should be involved?" and "Do participants understand the particular procedures to be used and how they fit into the total picture of school improvement?" The answers to such questions will differ from school to school. The principal must possess the skills to foster communication regarding these questions, set goals, then translate shared goals into student-centered programs.

3. Human Relations Abilities

Management skills are not enough. We hear such terms as trust building, motivation, communication, staff involvement and participatory decisionmaking. As surprising as it might seem, many schools are not institutions in which trust, motivation, communication and participation are apparent.

Good human relations in the school is a pre-condition to school improvement efforts. It is important, therefore, for the principal

to have human relations skills so that he or she can identify interpersonal needs, model appropriate behavior and assist others in developing like skills. The principal builds trust, motivation and communication only if he or she trusts, communicates and is motivated.

4. Political and Cultural Awareness

Accountability, parity, power and decentralization are all common terms surrounding schooling today. They have one thing in common. They have to do with the politics of education. Events of past years, for example, civil rights and inflation, have placed schooling squarely and overtly in the political arena. It is one institution over which its various constituencies still feel they have some control.

Typically, educators have attempted to be apolitical when it comes to their own business. That is no longer possible. Each school principal must have at least a rudimentary understanding of how the political and school systems operate. The principal has to understand why things are as they are if leadership is to be exerted.

Legislatures, boards of education, administrators, employee organizations, parents and community members are vying for power in order to be able to participate in making decisions about schools. In this process, conflicting things may happen. For example, legislatures and state education agencies demand more community participation in local school decisions while the same entities prescribe how schools should function, thereby limiting the scope of local decisionmaking.

Given the sociopolitical context of today's schools, it is important for the principal to understand politics and how they work. This means learning about the politics of education. More importantly, it means

keeping up with and translating into meaning education legislation and policy decisions made at federal, state and local levels. Most importantly, it means understanding the wants and needs of the local community in light of the purposes of education.

5. Leadership Skills

Those in leadership positions should be aware of and alert to major developments in their field.

The effective principal is research literate, knowing what is new in the field and what research and experience have shown to be good practice.

As an innovator, the principal looks outside the system as well as inside. This means that the principal reads about education, attends meetings and conferences, talks with university researchers, and takes opportunities to meet with other innovators, including other principals.

New ideas and information are viewed with an open mind. The principal is not threatened by new trends and tries to deal with them objectively. He or she shares with faculty and parents new learning theories which are pertinent to classroom instruction or school improvement.

The effective principal tries to recognize trends which promise to be short-lived. The aware principal knows that long-range, complex problems are usually solvable. He or she knows that the technology to deal with many education problems is available and only needs to be searched out and adapted to local school needs.

6. Self-Understanding

Those in leadership positions need to be introspective. They should try to understand their own values and why these values cause them to behave toward others as they do.

Facilitating the work of others, particularly when the values of others differ from ours, is difficult to do. The task can be easier if the principal gains self-understanding through an assessment of his or her own strengths and weaknesses, knowledge of how others see him or her, knowledge of his or her disposition to change, and participation in ongoing, personalized professional development.

Important to the process of self-understanding is feedback. The leader must be willing and able to learn about him or herself from others. This requires a degree of openness and willingness to periodically check actions with others.

The feedback process does not preclude the leader from adhering to his or her values. In fact, the situation may call for adherence to a value, coupled with communication as to why the value is strictly held.

Finally, principals need to review what motivates them to seek and retain a leadership position and whether their leadership is productive. If the principal feels ineffective, there should be no shame in seeking needed help or even leaving the position if that action seems best.

APPENDIX B

GENERAL CRITERIA FOR THE EVALUATION OF PRINCIPALS (Exemplary Only)

1. Instructional Skills

1.1 The principal will demonstrate an ability to monitor instruction by:

--evaluating with teachers their performance using criteria derived from sound principles of learning (e.g., knowledge of objectives, appropriate practice, knowledge of results, appropriateness of content and materials).

--assisting teachers in planning improved instructional practices.

1.2 The principal will demonstrate an ability to provide curriculum leadership at the school level by:

--establishing a process for defining goals for the school.

--establishing a process through which learning opportunities (e.g., courses or instructional programs) are selected and organized to meet the goals of the school.

--establishing an ongoing process of evaluation which allows for continual improvement of the school's instructional programs.

1.3 The principal will demonstrate an ability to bring to the classroom and school the human and material resources necessary for

improvement of instruction at the school.

2. Management Skills

2.1 The principal will demonstrate an ability to set and attain work objectives.

2.2 The principal will demonstrate management skills through the successful use in the school of such procedures as:

--needs assessment and goal setting;

--problem identification and solving;

--unit budgeting;

--monitor and review procedures.

3. Human Relations Abilities

3.1 The principal will demonstrate human relations abilities through the development and implementation of plans which:

--involve parents, teachers, students and others in school based decisionmaking;

--provide for open, honest and ongoing communications within the school and between the school and the community;

--create an atmosphere of trust at the school;

--motivate students and staff to perform to their capacity at the school.

3.2 The principal will periodically involve staff and community in the assessment of the school work environment, decisionmaking structures and communication between the school and community.

4. Political and Cultural Awareness

4.1 The principal will develop ongoing communication between the school and community.

4.2 The principal will be able to assess the constituencies and power blocks within the school community and will see that they are involved in school level decisionmaking.

4.3 The principal will demonstrate an ability to resolve conflict as it arises within the school or between the school and community.

4.4 The principal will see that the needs of all clients of the school are met by the school program. (See also 1.1 and 3.2 above.)

5. Leadership Skills

5.1 The principal will demonstrate a willingness to keep abreast of current developments in the field through a stated plan of self-development which includes reading, participation in in-service activities, conference attendance, visitations and/or other professional development activities.

5.2 The principal will demonstrate leadership skills through a willingness to share new ideas with the school staff, other principals, district personnel, parents and the public.

6. Self-Understanding

6.1 The principal will periodically involve staff and community in the assessment of his or her leadership abilities.

6.2 The principal will develop a plan for self-improvement. (See also 2.1.)

APPENDIX C

100% **REVISED**
SCOPE AND CONTENT STATEMENT
FOR ADMINISTRATIVE SERVICES EXAMINATION
REFLECTING RESPONSES FROM FIELD

Effective educational administration demands a high level of competence in leadership and human relations. While emphasizing the importance of these qualities, the Scope and Content Statement also reflects the skills needed for: (1) community awareness and involvement, (2) improved educational programs, and (3) continued development of managerial skills, including evidence of written communication skills.

25% I. HUMAN RELATIONS

7% A. Attitudes and Skills

1. Intrapersonal

a. Flexibility

b. Insight into personal values and perspectives

c. Listening skills

2. Interpersonal

a. Individual and group attitudes, behaviors and interactions

b. Rapport, trust and mutual respect

c. Listening and communicating skills

5% B. Community Relations

1. Public relations and information

a. Community groups and information

b. Use of media

2. Assessment of community needs and relationships

5% C. School Community Awareness

1. Demographic and sociological trends or movements

2. Understanding of ethnic and socio-economic groups

a. Cultural and economic patterns

b. Contributions of various cultures

3. Understanding power structures

4. Working with boards of trustees, other appropriate boards and agencies, advisory committees and site councils

4% D. Conflict Resolution

1. Group/social dynamics and process

2. Knowledge and techniques of conflict resolution

2% E. Sensitivity to and Respect for Roles, Rights and Responsibilities of Others

2% F. Dealing with Controversial Issues

35% II. LEADERSHIP AND MANAGEMENT SKILLS

5% A. Decision Making and Problem Solving Process

7% B. Communication Skills with Students, Staff, Parents and Community

1. Interpersonal

2. Organizational

3. Public information

7% C. Personnel Management

1. Selection, classification and assignment of policies and procedures

2. Supervisory techniques and relationships

3. Evaluation and professional growth techniques

4. Employee relations

a. Collective bargaining

b. Certificated personnel practices

c. Classified personnel practices

8% D. Budgeting and Management of Resources

1. Human

2. Physical

3. Financial

4. Time

2% E. Understanding Organizational Structure and Role Identification

2% F. Establishing and Evaluating Personal and Organizational Goals and Objectives

4% G. Understanding of Leadership and Management Theories, Styles and Techniques

20% III. CURRICULUM AND INSTRUCTION

10% A. Foundations for Curriculum Planning

2% 1. Historical and philosophical backgrounds of education

a. Analysis of trends, aims and purposes; i.e. mainstreaming

b. Appraisal and synthesis of past and current concepts and practices

3% 2. Social forces and strategies affecting curriculum design

a. Implications of political, social and economic influences

b. Selection of appropriate strategies for implementation of curriculum design

5% 3. Human Development

a. Basic psychological principles

b. Growth and developmental factors affecting curriculum

c. Subject matter content and goals of instruction in relation to the cognitive, affective, and psychomotor domains

d. Programs for exceptional students

10% B. Process of Development and Improvement

2% 1. Assessment of needs

2% 2. Selection of objectives, aims and goals of instruction

2% 3. Development of a curriculum plan

a. Designation of appropriate content, learning experiences, and teaching aids

b. Selection of methods of instruction

2% 4. Essential factors and techniques for implementation

a. Leadership roles and staffing

b. Involvement of staff, students, parents, and community

c. Staff development

d. Resource support

e. Dissemination of information and feedback

2% 5. Evaluation of curriculum design and process

a. Principles and methods

b. Selection of procedures commensurate with designated objectives, aims and goals

c. Plans for recommendations and revisions

d. Procedures for continuous study, evaluation and implementation of curriculum

20% IV. GOVERNANCE, LEGISLATION AND COURT DECISIONS

5% A. Legal Framework of Education and Public School Organization: Federal, State, and Local

7% B. Significant Laws, Codes, Court Decisions and District Policies Relating to:

1. Staff, students, parents, and community

2. Due process

3. Tort liability

2% C. Contract Administration

1. Employee

2. Business

6% D. Financial Support - Federal, State, Local

1. Categorical and general funding

2. State budget requirements, budgeting procedures and recent legislation affecting local school districts

APPENDIX D

LEGISLATIVE PROGRAM ANALYSIS

COMPONENTS:	AB65	AB551	PL94-482	Title I Fed Reg Pt IV	Title 5 EDY	Title 5 Desegregation	AB1329	504 CFR Title 45-84	AB1250	PL94-142 CFR Title 45-121	PL94-142 CAC Title 5:3150	Title IX Civil Rights
ADVISORY COUNCILS	52011-3 52021	44670.9 44680.4-0.5	532b	116a.25	4101		5767.14		1	CFR 45.121a 650,226		
ARTICULATION	51215-6			116a.41	4100			84.44	56301(g) 56336.5			
BILINGUAL EDUCATION	52015-6 52168/52170-7	44670.3		116a.22			all sections		56301(i) 56302(4)		3159	
COMPENSATORY EDUCATION	52170/54020-6 5400-6/54030	44670.3	533	116a	4100's			84.3 84.5				
CURRICULUM DEVELOPMENT	52015 a & b	44670.3	532(a)(2)(A)			Sec 95(a)			EC56332 56330(m)			86.34
INDIVIDUALIZED INSTRUCTION	52015a 52017	44670.3		116.47 116a.22	3931		5767.2(f)	84.33(b)(2)		130 344,343(c)	3154	86.31 86.34
NEEDS ASSESSMENT	52014	44670.5	532(a)(2)(A)(B)	116a.21	3930			84.32	563 EC56330(a)(b)	382,383 128,220		86.3 86.41
PARENT EDUCATION	52016c	44670.3		116a.25g-2		and community Sec 5 (c)						
PARENT INVOLVEMENT	52016a	44670.3		116a.22 (8) 116a.25	3932	and community See text Sec 94 & 95	5767.14	84.35 84.36	2	9	3151(i), 31569	
POLICY DEVELOPMENT	51215-6/52011 52034c/52039	44670.5		116.6 116.7	4020-2	Secs 94 & 95	5767.1					86.8 86.9
PLANNING	52015-6 52034c	44670.5	532(a)(1)	116a.21a	3930				56316 56330		3155	
PROGRAM AND PUPIL EVALUATION	52015g/52034 52037-8/52177	44670.5 44680.2		116.22(a)(b) 116.43	4070 4060		5767.9		3	148		86.36
PUPIL ASSESSMENT	52015g 51215-25	44670.3 44680.1-0.2		116a.21f			5767.4(b) 5767.8	84.35	4		3151(f) 3152, 3165	86.36
RESTRUCTURING OF CURRICULUM/ORGANIZATION	52010-39	44670										86.31
STAFF DEVELOPMENT	52019/52022 540040/521706	44670.1,0.4,.9 44670.2,0.3	532(a)(2)(B)	116.34 116.36	3933 4200-9	Sec 95(a)	5767.8 5767.05		5	224,350,381 386,387	3165	86.3
COUNSELING/ATTENDANCE	52015/52017 52022											86.3 86.36
WORK EXPERIENCE/ EDUCATIONAL ALTERNATIVES	52017							84.47/84.37 84.46/84.41	56330(g) 56332(b-3)		3154 (b) (i) 3154 (6) (3) (D)	86.34
INSTRUCTIONAL MATERIALS	52015a	44670.3		116.40	3948				56360(g)			
PROGRAM IMPLEMENTATION	52020-1			116a.22					6	122(a), 123, 125,225,320		
WAIVER	52033						5767.4 a,b					86.4 86.71
LEAST RESTRICTIVE (mainstreaming)								84.34(c)	7	550,551,552 227,305	3151(f) 3155 3154(6)	
PRESCHOOL				116.48 Sec 101	4115				56301(b)(c) 56331			
OVER AND ABOVE SERVICES	52169c			116.19	3940 4102							
DATA COLLECTION						Secs 93 & 97	5767.3					
PRIVATE SCHOOL FUNDING								84.33(a)(b)(c)	8	121a.4 121a.13		
NO EMPLOYMENT									EC56330(o)	150,239		86.52-.57
ARCHITECTURAL BARRIERS								84.22 (a)(b)(c)(d)				86.32

1250 1) 56330(r) EC56301(e)(r) EC33590 2) 56507, 505, 719 EC58341.2 56330(s) CAC 5 3151(f) EC58301(i) 56330(r) 56336.2(b)
2 con't 56336.3(c) 56341.1-.4 3) 56301(L) 56330(K)(V) 56336.3 56350 EC56351 56354 4) EC56336.6.4
4 con't 56301(i) 56330(b) 56336.2(a)(b) 5) EC56333(GXZ) EC67.5 EC56332.5-.6 56330(n) 6) 56314-16 EC56301
5 con't EC 57330 56332 7) EC56301(f) 56333 56330(i)(j) 56336.2 8) 58030-56042 EC58304, 56367 56332(a)(3)(b)(3)

94-142 9) 502,504,505,508,608,662-578,514,45 345

Note: Additional Components or Legislation can be added such as AB530 re Due Process

Matrix Explanation

Major program components have been identified on the left side of the matrix, with the laws and regulations across the top. Sections cited below each law or regulation are aligned with the appropriate program component

Prepared by:

Office of the Los Angeles County Superintendent of Schools
AB 65 Plus Steering Committee

APPENDIX E

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